18 August 1972

MEMORANDUM FOR: Chief, Retirement Affairs Division

SUBJECT : CIARDS Retirement Projection for FY 1973-FY 1977

- 1. Attached is SRB/OP's estimate of CIARDS retirements ranging from an annual average of 210 to 225 during FY 1973-FY 1977. Using a somewhat different approach, I hold a similar view.
- 2. The attachment keys on the probable CIARDS population and uses experience factors to estimate CIARDS eligibles, among total E-5 participants, and to judge the number of employees who are apt to retire mandatorily or voluntarily from among the eligible group.
- 3. I think the formula in paragraph 6 of the attachment is the best one available to us. I have some anxiety, however, about the probable annual number of CIARDS participants, estimated at without being able to prove it, I suspect E-5 participants will more nearly average annually, which could make a difference of as many as 10 to 20 retirements a year. Although data are lacking on the number of participants that will become eligible each year during FY 1973-FY 1977, the Plans Staff made a manual count a couple of years ago of CIARDS eligibles in the Grades GS-11 to GS-18. These data tend to suggest that the E-5 participant base might average FY 1973-FY 1977 and the eligible base might range between 850 and 900.
- 4. Although I suspect application of the formula in paragraph 6 of the attachment could be 10 to 20 retirements too high on an annual basis, I believe it is realistic to plug in a comparable number for Discontinued Service. It is my guess the assumption in paragraph 5 will not prove out. The quota cannot be considered as an inhibiting factor in estimating retirements during FY 1973-FY 1977. Since the quota limit will probably be exhausted by the close of the current Fiscal Year, some remedial action must be taken or all CIARDS retirements would be precluded in FY 1974. The apparent basis for assuming no involuntary retirements between FY 1974 and FY 1977 is the presumption that no ceiling cuts or strength reductions will occur during this period, resulting in the use of involuntary CIARDS retirements. I am inclined to believe there will be ten or more involuntary CIARDS retirements in FY 1973, and future strength reductions, as adjustments

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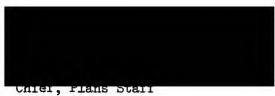
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in different parts of the Agency, will result in an annual average of 10 to 20 involuntary retirements in some of the years during FY 1974-FY 1977.

5. Short of extensive and time-consuming manual calculations, little more can be done to zone in closer to the size of the E-5 participating group and the E-5 eligible base. Accordingly, I think a range of 200 to 225 CIARDS retirements a year represents as good an estimate as can be made at this time. If the Office of Finance has an option, I suggest that Office play it safe and use the 225 figure for funding purposes.



Att

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ESTIMATED NUMBER OF CLARDS STAFF EMPLOYEE RETIREMENTS FOR FISCAL YEARS 1973 THROUGH 1977

- 1. This is in response to the request to have OP/CD/SRB estimate the number of CIARDS retirements for the next five fiscal years.
- 2. The number of permanent designees in the CIARDS system (E-5 participants) were reviewed as of 30 June for the past four years. They were split into four groups:
 - a. Eligible for voluntary retirement -- these employees were over 49 and had 20 years of creditable service;
 - b. Rigible for involuntary retirement -- these employees were under 50 but had 25 years of creditable service;
 - c. Eligible for mandatory retirement -- these employees were at least 59 years of age and had at least 19 years of creditable service and would have to retire in the next 12 months or be granted an extension; and
 - d. Non-eligible -- not eligible for voluntary retirement but could be retired for a disability.
- 3. The review showed that the number of E-5's who were eligible for either voluntary or mandatory retirement comprised from 24.7% in 1969 to 29.7% in 1972 of the total E-5 population. These combined retirement eligibles had a retirement rate of 21.5%. The non-eligible and eligible for involuntary retirement comprised the remaining 75.3% in 1969 and 70.3% in 1972, and they had a retirement rate of 2.6% of eligibles.
- 4. The size of the E-5 population continued to grow throughout the four-year period and it seems that it will level off at about participants during the next five-year period.
- 5. The discontinued service retirements will decrease during Fiscal Year 1973 and be phased out entirely by Fiscal Year 1974. Based on averages for the past four years, an estimate of 31 retirees would leave the Agency under this program. With this program phased out, the projected retirees will have to wait from one to eight years to retire voluntarily.

* More accurately, this is "involuntary"
CIAROS

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